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INTERNATIONAL DEMOGRAPHICS

CONSUMER ■ TRENDS ■ AND ■ MARKETS ■ ABROAD

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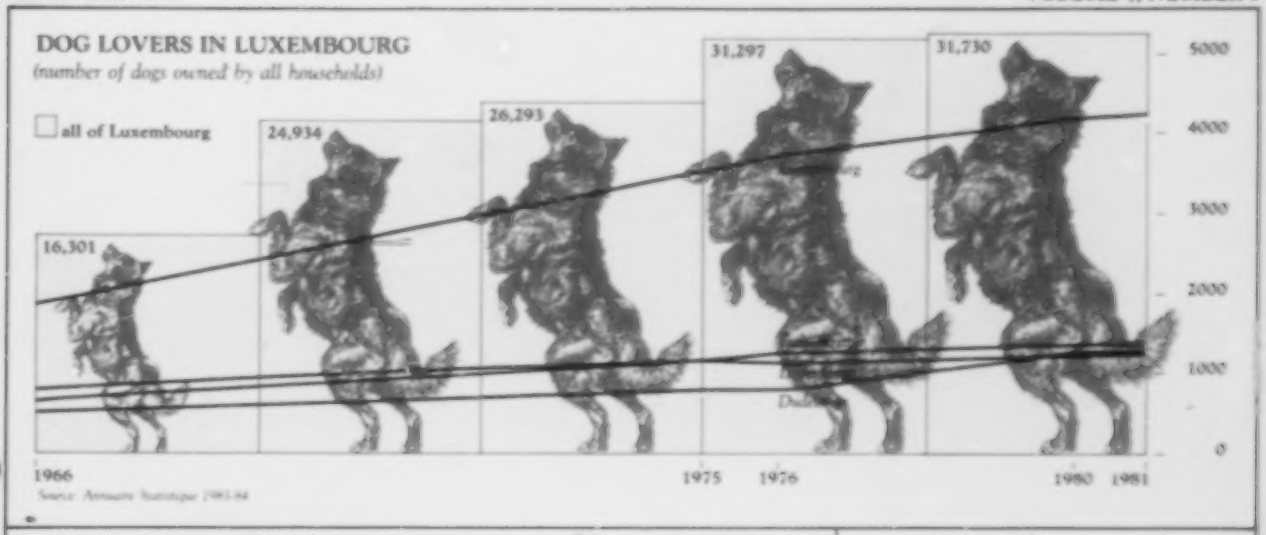

COUNTRY PROFILE

GRAND DUCHY OF LUXEMBOURG

The Grand Duchy. The name calls forth visions of a medieval kingdom on film by Hollywood. Compared to the rest of Europe where there are nagging socioeconomic problems, the reality of Luxembourg today seems close to that mythic portrayal.

Consider the awe accorded to Luxembourg by France. A country not noted for easy praise of other cultures found little to deplore except the quality of coffee, when earlier this year it aired over state-run television a look at life in its northern neighbor and Common Market partner. Among the reasons for its admiration, Luxembourg has:

—The highest standard of living within the 14-member European Community, with two-car households the rule rather than the exception.

—Home ownership of about 70 percent.

—Unemployment of about 2 percent and a sharply declining inflation rate — from 8.6 in 1983 to about 5.7 last year.

—Well-entrenched "consensus politics" bringing government, management and labor into the decision-making process. This so-called "Luxembourg Model" has allowed the country to restructure and modernize an economically important, but hitherto hidebound steel sector. And it has done so without job losses and with productivity increases rivaling Japan's. Nowhere else in Western Europe has this happened.

—Social stability and flexibility, virtually an unknown in France, has produced only one strike since 1945 and fosters diversification away from dependence on traditional industry and finance.

The French program's reporter asked a reasonably well-off, born-and-bred Luxembourger — married and the father of two children — whether the austerity evident elsewhere in Europe affected his family's own comfortable lifestyle. Definitely not, came the answer.

Did he feel optimistic about his country's economic future? A firm yes. Did he feel he echoed the senti-

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THIS MONTH: LUXEMBOURG

ments of most of his compatriots? Another affirmative.

The World Bank holds a similar view. Only four oil-producing countries and Switzerland are ranked as having higher per capita incomes.

Positive conditions and attitudes, coupled with commercial incentives, were largely responsible for attracting the large number of conservative international banks to the Grand Duchy in the 1960s and 1970s and, more recently, in keeping with the country's diversification planning, international insurance companies. Banking has plateaued, but Luxembourg remains a prime continental financial center, especially for funds management.

THE CULTURE

The wealth represented by the Grand Duchy of Luxembourg outstrips its small size and modest population. Bordered on the south by France, on the west and north by Belgium, and on the east by West Germany, the country occupies only 999 square miles. Maximum north-south distance is 51 miles, greatest width is 36 miles.

Censuses of population have been conducted at regular intervals since 1875. The 1981 census counted 364,600 residents. The government estimates the 1985 population at 365,800. Twenty-six percent of the population are immigrants. The only city of note in Luxembourg is the capital and shares the country's name. The 1981 census counted 78,900 residents of the city of Luxembourg.

Esteemed today for its solid social fabric, Luxembourg since its inception in 963 has been prized for its strategic location in the heart of Europe. Over the centuries, the tiny Grand Duchy has been beseiged by most of its near neighbors and some farther afield and its borders have shifted according to outside domination. Treaty obligations, futhermore, have limited the growth of the city of Luxembourg.

A long history of occupation and immigration is apparent by the present-day mix of languages. *Letzebuergesch* or Luxembourgish, a dialect of German origin, was given legal status as the official national language only in February of last year. However, French continues as the government's language of record and classical German as the working one.

Most newspapers are published in German, but the early presence of a large Italian population, and the influx over the past three decades of American companies such as Goodyear Tire and Rubber and others from Britain, have spawned journals having four languages in the same edition. Occasionally Spanish and Portuguese are used as well. The language inheritance is a decided asset for Luxembourg's business community. And, Luxembourgers are quick to say their traditional cuisine combines fine French preparation with ample German servings.

Ninety-seven percent of Luxembourgers are Roman Catholic. Nonnative Luxembourgers have a slightly higher proportion of non-Catholics among their ranks.

A constitutional monarchy, Luxembourg is governed today by an elected coalition of Socialists and center-right Christian Socialists who share evenly in ministerial council seats. The country is administered through 12 cantons, 3 administration districts, 4 electoral districts, and 2 judicial districts.

VITAL STATISTICS

The total fertility rate (average number of children per woman) was 1.4 in 1983, substantially below replacement level of 2.1. The birthrate has declined since the mid-1960s so that, without immigration, Luxembourg faces a declining population as do so many of its neighbors. By *International Demographics'* own projections, the Grand Duchy by the year 2000, if present trends continue, will have a population of only about 349,000 including a third or more non-natives.

There were 3,760 deaths among the indigenous population in 1983. About 50,000 Luxembourgers are over age 65. Among those under age 65, the largest group is made up of young adults in their 20s. People aged 20 and 29 compose 16 percent of the population.

Confronted with falling birthrates, Luxembourg officials, like many of their neighbors, foresee a national identity crisis. Former premier and foreign minister Gaston Thorn goes further, calling it "a collective tendency to suicide." Various schemes have been put forward to check the situation, but to little avail. Included among them is encouraging an increase in transient workers from the Grand Duchy's three neighboring countries.

Already 26 percent of Luxembourg's population are immigrants. At that it is said to be the highest in the European Community countries, and it is expected to increase still more unless native births rise. Immigration has been actively promoted to fill jobs lower on the socioeconomic scale rejected by natives, and

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from all appearances, the immigrants have been assimilated into the native culture with less strife than in bordering countries where high unemployment rates prevail. At least 60 percent of manual laborers — who are primarily immigrants — own homes. Foreigners occupy about 90 percent of the construction trades, more than 50 percent of industrial jobs, and 60 percent of jobs held by skilled artisans.

The Portuguese are by far the largest immigrant group at 15,900, or nearly 30 percent of the non-natives registered during 1983. The number of Portuguese in Luxembourg has nearly tripled since 1970 when an agreement was signed with Portugal to make entry easier.

Italians had traditionally been the second-largest non-native group, a position ceded to the French since 1980. In 1983 nearly 19 percent of foreigners were French and nearly 17 percent Italian. Belgians historically have made up Luxembourg's fourth-largest non-native group of workers, at about 16 percent in 1983.

United States citizens working in the Grand Duchy plateaued in 1970 at less than 1 percent.

The urban agglomerations to which most foreign workers are drawn are, like the country itself, small. Luxembourg city with nearly 79,000 residents in 1981 is more than three times the size of second-ranking population center Esch-sur-Alzette with only 25,100 people in 1981. Following these are seven localities ranging in size from 8,600 to 4,900, according to the census.

HOUSEHOLDS AND FAMILIES

The 1981 census counted 128,456 households in Luxembourg, with an average household size of 2.83 people. Twenty-one percent of households have only one person. Another 29 percent have two people, and 21 percent have three people. Only about 4 percent of households have six or more people.

The majority of households have plumbing and central heating. The number of households with freezers has more than doubled in the last 10 years, and the numbers of households with cars, televisions, washing machines, and refrigerators has risen steadily (see table on page 6).

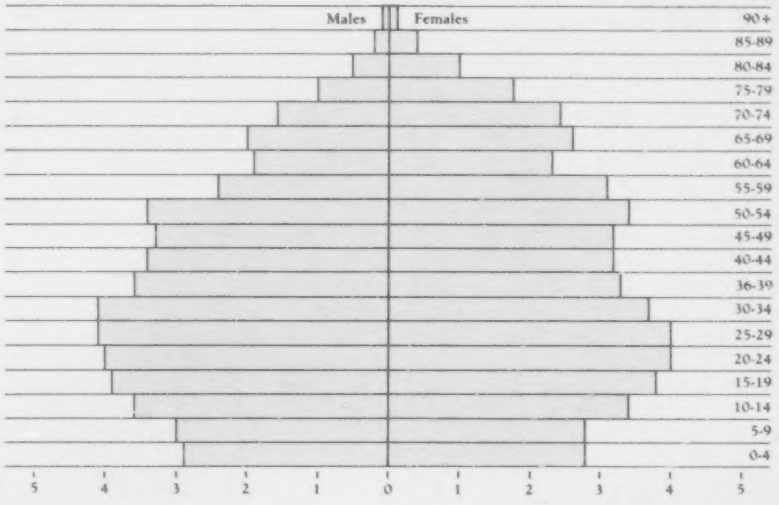
Twenty-four percent of men over age 18 and 23 percent of women over age 15 have never married. Sixty-eight percent of men and 58 percent of women are married. The differences in marital status are most apparent among those aged 65 and over. Nineteen percent of men over age 65 are widowers but 55 percent of women in the same age group are widows. Luxembourg faces the typical problems of an aging society, with the situation exacerbated in this tiny country by the effects of the world wars. Especially after age 65, women in group housing arrangements, including nursing homes, outnumber men by more than two to one.

LABOR FORCE AND INCOME

There were 158,500 people fully employed in Luxembourg in 1983, a slight decline from 1980-81, but an increase of about 18,000 people over 1970 levels. (These figures do not include 13,500 commuters from Belgium, France, and West Germany nor 7,000 or so employed by international organizations, such as the European Community Secretariat headquartered near Luxembourg

POPULATION OF LUXEMBOURG BY AGE AND SEX: 1981

(in percent)



age	*total*	*males*	*females*
All ages	364,602	177,869	186,733
0-4	20,850	10,610	10,240
5-9	21,262	10,956	10,306
10-14	25,386	12,964	12,422
15-19	27,948	14,151	13,797
20-24	29,118	14,436	14,682
25-29	29,366	14,793	14,573
30-34	28,468	14,817	13,651
35-39	24,897	13,007	11,890
40-44	23,994	12,297	11,697
45-49	23,645	12,064	11,581
50-54	24,774	12,531	12,243
55-59	19,945	8,809	11,136
60-64	15,403	6,959	8,444
65-69	16,557	7,116	9,441
70-74	14,631	6,004	8,627
75-79	10,163	3,736	6,427
80-84	5,510	1,829	3,681
85-89	2,076	615	1,461
90-94	527	157	370
95+	82	18	64

Source: Recensement General de la Population Du 31 Mars 1981, October 1983, Ministere de L'Economie, Grand-Duche de Luxembourg.

LUXEMBOURG'S CITIES: 1947-1981

(populations in thousands)

	1947	1970	1981
Luxembourg	62.0	76.2	78.9
Esch-sur-Alzette	26.9	27.6	25.1
Dudelange	12.9	14.6	14.1
Differdange	7.4	9.3	8.6
Schifflange	5.1	6.4	6.6
Petange	5.4	6.2	6.4
Ettelbruck	4.2	6.0	6.0
Bettembourg	4.5	5.7	5.8
Diekirch	3.8	5.1	5.6
Belvaux	2.6	4.9	4.9

Source: Le Grand-Duche De Luxembourg en Chiffres 1984, Ministere de L'Economie, Service Central

city.) Women made up 41 percent of the labor force in 1982.

Of the 138,600 workers on salary, 45 percent worked in services, 29 percent in industry, 15 percent in public administration, 10 percent in construction, and less than 1 percent in agriculture. About 13 percent of the total labor force is made up of employers and family workers.

Luxembourg has not escaped rising unemployment, but at 1.6 percent of the work force in 1983, it remains among the lowest in the Western world. From zero unemployment during the banking boom years of 1968 to 1975, the unemployment rate rose to 1 percent in 1981 and 1.3 percent in 1982.

Rapid wealth development in the Grand Duchy began in the 1920s. Steel fostered this financial growth which was underpinned by a favorable exchange rate through the mid-1960s. Today a modernized steel industry is a major contributor to the country's gross domestic product.

The steel industry employed 12,500 workers in 1983 — down from 14,000 the year before as one result of restructuring. Foreign workers were nearly 38 percent of this work force. The banking and insurance sectors employed 9,023 in 1983 or 6.5 percent of all salaried employees. More than 30 percent of personnel in banking and insurance are foreigners.

Among American companies, Goodyear employs about 6,500 people and General Motors 400. In all, U.S. firms provide jobs for about 10,800 people.

Some even find employment in the Grand Duchy's vineyards — small and probably the most northerly in the world. The mostly dry, fruity whites harvested from 468 acres are more than 50 percent consumed at home with a large part of the balance going to Belgium. Luxembourg has had a trade alliance with Belgium since France turned one down in 1921.

Luxembourg's own small airline provides some additional employment, Luxair, flying from the same airport as Icelandic, and specializing in charter vacations to exotic locations, transported 692,000 passengers in 1982.

To cope with the difficulties in steel overcapacity worldwide and a slowing of real growth in the international banking sector, Luxembourg's authorities — led by Crown Prince Henri as head of a 12-member economic development board — have been courting new high- and low-tech industries over recent years. The board runs offices in New York and Tokyo. Plans at press time were to open one this summer in California.

International insurers have come under this scheme as a natural extension of the banking sector. Prior to 1970, the term "broker" was prohibited and insurance was limited to local business. But in 1970, enabling legislation was passed to encourage the insurance industry.

Somewhat surprisingly, industry and commerce is not the largest source of tax revenue. That status belongs to privately controlled Radio Television Luxembourg, which is rapidly moving into a prime position in European broadcasting too (see sidebar).

Despite mandatory indexing — tying salaries to inflationary price increases — real overall purchasing power declined 1.7 percent in 1982 and 1.1 percent in 1983, the latest years for which figures are available. Special legislation was introduced in 1982 to shore up worker categories most affected by this decline.

In general, indexing has added 2.5 percent to annual salaries, bringing the average hourly wage to 412.02 LF (about $6.54 US) as of September 1984. The average annual salary, according to government estimates ranged from 777,395 to 786,010 LF ($12,340 to $12,476).

The hourly wage for single manual laborers in September 1984 was the equivalent of about $2.50 while that for a laborer with a family was $2.57.

EUROPE'S BEST STANDARD OF LIVING

Spending patterns in the Grand Duchy are unmatched anywhere else in Europe. Government figures for 1982 value total private consumption at about $1.5 million, an increase of 11.7 percent over 1981. Using 1965 as 100, the general consumer price index rose from 260.7 in 1982 to 283.3 the subsequent year.

There were 145,849 private and commercial vehicles registered in Luxembourg at the beginning of 1984, more than two vehicles per person. Nearly 40 percent of cars are imported from West Germany, a quarter from France, and 13 percent from Japan. Only about 3 percent are U.S. imports.

A large portion of household budgets is devoted to further education, leisure, and culture, recording a 9.3 percent increase in 1983. During the same period, alcohol and tobacco consumption rose 3.1 percent. Beer drinking alone reached 120 liters per person annually.

Declining consumption includes clothing and shoes, furniture and household cleaners, and milk, the farm leader. Each Luxembourg resident in 1983 drank the equivalent of 78 kilograms of milk, consumed 11.4 kg. of butter, and 11.1 kg. of cheese.

As of June 1984, cigarettes sold for the equivalent of about 66 cents, a man's suit for about $123 and shoes to match for $38. A kilometer in a taxi costs the same as a pack of ciga-

rettes, a ticket on a bus about 39 cents. Movies cost about $2.00. Doctors charge $7.50 a visit. That coffee the French deplored was $6.00 per kg. and a good steak went for about $8.00.

Sports clubs are an important form of socialization in Luxembourg. In 1982, there were 418 clubs for olympic sports ranging from judo to basketball to canoeing and kayaking. Another 352 were organized around non-olympic sports. Based on the number of club participants, soccer, bicycling, basketball, and gymnastics are the most popular sports. Interest in tennis spurted in the early 1980s and has been on the rise ever since.

Primary school enrollment during the 1983-84 school year was estimated at 25,806 students. Secondary schools enrolled an estimated 9,000 students in regular studies and more than 16,000 in trade programs. During 1982-83, about 2,700 students attended university-level courses, for the most part outside of Luxembourg.

SOURCES

Six of seven planned volumes on the 1981 census are available at 250 LF from Ministere de L'Economie, BP 304, 2013 Luxembourg. Visitors to the Grand Duchy will find the ministry building at 19-21 boulevard Royal (telephone 478-1). Luxembourg's development offices in New York and California should also have copies.

Volume I includes personal characteristics; Volume II, socioeconomic characteristics; Volume III, internal

INSIDE INFORMATION

LUXEMBOURG'S OTHER OFFSHORE INTEREST

Early next July France's three-billion franc telecommunications satellite is slated to rocket into geostationary orbit high above west-central Europe. Although CLT, the region's leading broadcaster, is expected to be aboard, negotiations are still taking place.

CLT is the acronym for Compagnie Luxembourgeoise de Telediffusion, which has been based since 1929 and the early days of radio in Luxembourg. Today it is an "offshore" interest, with scope and influence like banking and finance well beyond the tiny country.

CLT, popularly known by its call letters, RTL, broadcasts in five languages, including English, to a combined daily radio and television audience of 45 million spread across six or more countries — including France where RTL is the most popular.

A public-service monoploy, CLT owns outright or has a share of, about 80 separate communications activities ranging from program production to book and magazine publishing. A wholly-owned weekly TV magazine has tripled its circulation over the past four years to 1.24 million readers.

CLT last year improved its earnings nearly 12 percent to 10.78 LF and paid 1.8 billion of it in taxes and licensing fees, thus providing the government with 2.5 percent of its operating revenue and making the multi-media force the country's largest individual taxpayer.

France has courted CLT to join the launching and use of TDF1 as its new satellite is is called because of criticism its government received about the high cost of going solo. But unresolved at press time were differences over the technology France wants and CLT's desire for exclusive rights to the advertising it will sell. France sees its role on TFD1 as spreading culture to the reception area, while CLT wants to protect its commercial rights.

A ONE-OF-A-KIND INDUSTRIAL MODEL

When France's Socialist government announced mill closings and severe labor cutbacks in its debt-ridden nationalized steel industry, unionized workers reacted in the classic Gallic manner by taking to the streets with sometimes violent protest.

When a dozen years ago Luxembourg decided on the same course, barely a whisper was heard from the close to 28,000 employees in steel. That too was typical — a reflection of the so-called "Luxembourg model" for relatively trouble-free economic readjustment which is the envy of other European politicians and business executives.

Since 1974, some 14,000 steel jobs — half the former labor force — have been eliminated and automation has taken over. Today one mill with a staff of only eight people rivals Japanese production by turning out 180 tons an hour. No one was forced out of work as a result of severe restructuring of the country's largest employer. More than one-third of workers in steel were foreigners, compared with 52 percent of workers in Luxembourg industry overall.

Some opted to leave voluntarily, others took early retirement, but most were absorbed by other sectors. For instance, about 4,000 former steel workers went to public works projects. These relocated workers carried with them their steel salaries and benefits even if the new posts were less arduous. This was the key to the ease with which the bold strategy went ahead. Steel jobs are expected to level off at 12,500, less than half what they were.

Obligatory *co-gestion*, or shared decision making by representatives of government, management, and labor promotes consensus, not confrontation, in the industrial and public sectors which have known only one strike in the past 40 years. It is something alien to the French. West German unions and management cooperate better, but a plan to streamline its steel industry through mergers collapsed in mid-July. Luxembourg's successful tripartite approach is even strongly defended by local managers of U.S. firms such as Goodyear.

This pragmatic focus on rebuilding is not lost on the rest of Europe. The late Robert Schumann, whose name is most closely associated with the continent's post-World War II recovery plan came from the city of Luxembourg.

TIPS ON TRENDS

STUDY DUE ON FRENCH WOMEN

Quantative results of a massive study on attitudes and consumption patterns among French women are exexpected to be ready in early October.

Called *Plurielles*, the study involved 1,200 90-minute interviews. It is expected to be renewed annually. The study is being conducted by Agence Femmes Information and the Demoscopie Research Institute. The full cost will be about $13,300, but single questions can be purchased for about $1,100.

For more information, contact Institut Francais de Demoscopie, 27, rue Chambery, 75015 Paris, France. Telephone: (1) 842-60-00.

—Peter Inserra

BRITAIN TRACKS USERS OF PERSONAL DATA

A law being phased in over three years in the United Kingdom could have a chilling effect on the use of data for market research, credit checks, direct mail, and other commercial uses in that country. Beginning in November, users of computerized personal information in the United Kingdom will be required to register under the Data Protection Act.

The Data Protection Act requires that data users and computer bureaus must register and adhere to the code of practice in order to protect individuals against the misuse of personal details and against damaging inaccuracies. After May 11, 1986, holding or processing personal data by an unregistered person will be a criminal offense.

Under the Act, people can already, in certain circumstances, claim compensation if they feel they have been hurt by the misuse of data. By 1987 when the Act is in full operation, people will have the right to examine information about them on computer systems.

Datasolve, a subsidiary of Thorn EMI, has the contract to develop and run the Data Protection Register, according to the *London Times*.

CONFERENCES

A conference on political risk will be held at the Halloran House in New York, October 28-29, sponsored by Frost and Sullivan. For information contact Victor Hertz, manager of political risk services at the address below.

Frost and Sullivan will also present "Selling Defense Equipment to the Third World," on December 11-12 at the Sheraton National Hotel in Arlington, Virginia. For more information, contact Eleanor Bernet, Industry Representative, Frost and Sullivan, Inc., 106 Fulton St., New York, NY 10038; (212) 233-1080.

JAPAN IS A GREAT BOOK MARKET

In any given year, best-sellers in Japan range from such books as *How to Enjoy Baseball Ten Times More* to *The Japanese Constitution*, according to a report on Japanese popular culture in the summer 1985 *Wilson Quarterly*.

Foreign titles are popular too. More than 400,000 copies of a translated version of *In Search Of Excellence* have been sold. For the most part, however, favorites remain Japanese historical epics, self-help manuals, mysteries, and biographies.

The report notes that more leisure time, higher incomes, and higher educational levels have contributed to the increase in reading. "Since 1960, the number of books brought out every year in Japan has quadrupled; the number of new titles has tripled. In 1983, the Japanese publishing industry put out roughly 31,000 new titles and a total of 1.2 billion volumes. The United States, with twice the population, published 42,000 new titles and a total of 1.9 billion volumes," the article reports.

Order this issue which discusses other cultural trends as well for $4.50 from Wilson International Center for Scholars, 600 Maryland Ave. S.W., Suite 430, Washington, DC 20560. •

POSSESSIONS IN LUXEMBOURG

(percent of households owning)

	1970	1981
Auto	56%	70%
Telephone	69	86
Television, color	—	57
Television, B&W	—	38
Washing machine	80	87
Refrigerator	87	96
Freezer	23	55

Source: Annuaire Statistique 1983/84, STATEC, Luxembourg

and cross-border migration; IV, households and families; V, household conditions; and VI, results by administrative subdivision. Volume VII — techniques — should be available this fall at the same price. All volumes are in French.

The Economy Ministry's Central Service of Statistics and Economic Studies (STATEC) publishes in English an excellent 12-ply, pocket-size leaflet summarizing Luxembourg's population characteristics and economy.

STATEC offers a number of other valuable publications in French, among them, *L'Economie Luxembourgeoise en 1982 et 1983* (378 pp.) issued in February 1985. It contains a 21-page sources list and other documentation available from STATEC. Foreign price and postage is available on request to STATEC.

The Grand Duchy's Service Information at Presse du Gouvernment, 10 boulevard Roosevelt, Luxembourg (city) issues well done general background literature. *Notice sur le Grand-Duche* captures the early and contemporary history of the country in 24 pages. Luxembourg's political structure is thoroughly described in the 84-page *Les Institutions de l'Etat Luxembourg*. In French only.

Luxembourg and Belgium, because of their close trade and commercial development links, operate a joint Belgo-Luxembourgeoise Chamber of Commerce in major cities. Contact the nearest Belgian or Luxembourg embassy or write the French office of the Chamber at 174, boulevard Haussmann, 75008 Paris, France. •

—Peter Inserra

Peter Inserra is International Demographics' *correspondent living in Paris.*

PUBLICATIONS

International Trends and Perspectives: Aging, by Jacob S. Siegel and Sally L. Hoover, 1984, Washington, DC: U.S. Bureau of the Census, 39 pp., free. Order from the Center for Demographic Studies, U.S. Census Bureau, Washington, DC 20233.

Firms that market health care or other products or services for the elderly will want to order this overview of the international aging population.

Continent-by-continent comparisons are offered, as well as comparisons between more developed and less developed countries.

For example, elderly people in less developed countries are more likely to be cared for within the traditional family structure than are older people in the more developed countries. While country-by-country data are not given, the publication does offer broad perspectives on issues involving the elderly.

China: The Health Sector, by Dean T. Jamison et al., 1984, Washington, DC: The World Bank, 244 pp., $10. Order from World Bank Publications, Washington, DC 20433.

China's efforts to reduce the incidence of communicable disease and the prevalence of malnutrition have led to a dramatic increase in life expectancy. Public health measures, combined with reductions in malnutrition, improved water supplies, and attention to hygiene and sanitation, have increased life expectancy from about 32 years in 1950 to 69 in 1980. That is only six years less than in fully industrialized countries.

This study highlights the progress China has made in health care in the last 30 years. It also points out that chronic disease such as cancer, stroke, and heart-disease is becoming more prevalent.

The major pitfall in the health-care progress that has been made in China, according to the study, is the temptation to emulate high-cost curative approaches that result in a massive drain on national resources in high-income countries.

The authors flag two important measures which would have a dramatic effect: control of salt intake and tobacco consumption. The Chinese consume more salt per capita than most other nationalities, and China has a high incidence of hypertension, heart disease, and stroke.

Also, despite a policy begun two years ago to discourage smoking, tobacco consumption has increased dramatically. The resulting increases in lung cancer, heart disease, and chronic respiratory diseases will cause much human suffering, lost productivity, and unnecessary medical expense, the authors conclude.

Women in the Work World, Statistics Canada, 1984 (99-940), $5.50. Order from Publications Sales and Service, Statistics Canada, Ottawa K1A OT6, Canada.

For those who market to Canadian households, the changing role of women is as important as it is in the United States. In 1981, 4.5 million Canadian women — more than 50 percent of women aged 15 and older — were working or looking for work. Fifty-six percent of mothers with children aged 2 to 5 years were working outside the home in 1981.

The publication, *Women in the Work World,* examines demographic and socioeconomic characteristics of the working woman including age, marital status, education, and province of residence.

Mobility and Identity in the Island Pacific, edited by Murray Chapman and Philip S. Morrison, 1984, Wellington, New Zealand: Victoria University Press, $19.00. Order from Business Manager, Pacific Viewpoint, Information and Publications Section, Victoria University of Wellington, Private Bag, Wellington, New Zealand.

Firms that do business in the Pacific Islands may be interested to learn more about the cultures and people there. This book was published as the result of an interdisciplinary

continued

INSIDE INFORMATION

COUNTRY DATA AVAILABLE ON DISKETTE

Demographic data for individual countries is now available on diskette from the Bureau of the Census. The data are loaded from the bureau's International Data Base to individual diskettes. A diskette is available for each of 203 countries.

Organized as a series of 94 statistical tables, the database contains demographic, economic and social data. Each table is annotated with information on sources, methods of collection, definitions of terms, methods used in computations, and qualifications of the data.

Each diskette has tables and notes for a single country. A computer program, written in Basic, is supplied to users to extract individual tables into formats acceptable to software packages such as LOTUS 1-2-3, DBASE, SUPERCALC, and SPSS. File documentation describes the contents of the tables and notes.

The cost for the first country purchase on diskette, including file documentation, is $15.00. The price for each additional country is $7.50.

The statistical tables from the International Data Base are also available in printed copy. When ordering printed copies, the first ten tables are free. Additional tables are $.25 each.

The data are from many sources including national statistical offices throughout the world, research centers and universities, and federal agencies. Currently there are over 200,000 records in the database and updates occur daily.

For more information on the diskettes or on the International Data Base, contact Greg Nowakowski, Center for International Research, Scuderi Building, Room 409, Bureau of the Census, Washington, DC 20233; (301) 763-4286. •

FEATURE

JAPANESE BABY BOOMERS FACE FEWER CHOICE JOB OPPORTUNITIES

Editor's Note: This article is translated from the Japanese newspaper, the Mainichi Shimbun, *by the Asia Foundation's Translation Service Center. It provides some insight into the Japanese drive to open new markets for their goods and services.*

For most white-collar employees of Japanese companies, the step up to executive status may soon be an impossible dream. By the year 2000, when children born during the first wave of the postwar baby boom are at the peak of their careers, and those born during the second wave are beginning to enter the job market, there will simply not be enough positions to go around.

At present, nine out of ten white-collar workers can expect to become a division or a section chief before reaching age 54. By the year 2000, this figure will drop to only one out of four. This discouraging picture was painted by a recently released Economic Planning Agency forecast of the employment situation for the year 2000.

The report predicts some major changes in Japan's employment structure over the next 15 years. First, the percentage of part-time and temporary workers will increase dramatically.

Total employment is expected to increase by 2.95 million jobs in research and development-related fields, by 1.33 million in sales and service, and 1.06 million in factory and office jobs.

Even when part-time and temporary workers are excluded, jobs in research and development will increase by 2.41 million. But the number of regular employees in the marketing and service industries will decline by some 860,000, while regular factory and office jobs will decline by 4.4 million.

In other words, one out of every three workers will be only a part-timer or a temporary by the year 2000, compared with one out of six in 1982.

The report points out that this sort of change in employment, combined with the trend towards office automation, will put pressure on the seniority-based wage system and cut down the number of high-level posts for older employees.

In 1983 the Ministry of Labor conducted a survey of the wages paid to white-collar workers with a college education. It found that 72 percent had been promoted to division or section chief between the ages of 45 and 49, while 92 percent of those between the ages of 50 and 54 held these senior posts.

By the year 2000, however, only 50 percent can expect to obtain these posts between ages 45 and 49, and a mere 27 percent between ages 50 and 54. Thus, for the second wave of baby boomers, a college education will no longer be a ticket to executive success.

The first-time job prospects of the second wave of baby boomers — those born between 1971 and 1974 — are also bleak. In a survey of personnel officers of companies listed on the Tokyo Stock Exchange, 57 percent said that achieving full employment for the college-educated man of the second wave will be either absolutely or probably impossible. About 77 percent gave the same answers for male high school students.

In order to absorb new entrants into the job market — and to keep current employees satisfied — the Economic Planning Agency report warns that a variety of short- and long-term steps will eventually be required. For a start, it proposes an increase in days off and vacations.

On the average, Japanese workers currently take only 101.2 days off per year. The report advises increasing vacation time to 140 days per year by switching to a five-day work week, encouraging employees to use their full annual vacations, and extending the Golden Week holiday (currently three days beginning in late April) to a full week.

The agency also recommends more specialist training. Japanese firms today encourage their employees to be generalists, familiar with all aspects of the company's business. The problem with this approach is that the employees never acquire skills that could be of immediate value to other firms.

The agency proposes the development of specialists in such standard fields as personnel, finance, and accounting who would be useful even if they move to other firms or seek post-retirement employment. •

symposium on mobility, identity, and policy in the islands.

Included are 14 papers about mobility and identity for Guam, Irian Jaya, Marshall Islands, Papua New Guinea, Solomon Islands, Tonga, Vanuatu, and Western Samoa. Comparisons are made with experiences in the eastern Caribbean, eastern Indonesia, and northern Europe.

The World Development Report 1985, by the staff of the World Bank, 1985, New York: Oxford University Press, 243 pp., $20 hardcover; $9.95 softcover. Order from World Bank Publications, P.O. Box 37525, Washington, DC 20013.

This year's report focuses on the current state of the global economy and debt-servicing difficulties, and presents economic projections for the next five years. The statistical appendix contains updated 1983 GNP per capita figures for all countries, as well as the World Bank's most recent estimates and projections for population growth, birth and death rates, labor force, urbanization, health, education, and income distribution.

continued on page 12

FEATURE

THE SMALLEST COUNTRIES

As shown by the Luxembourg profile this month, small countries can exert an influence out of proportion with the size of their population, especially when they are trend-setters for their region.

The World Bank's annual compilation of data in *The World Development Report* presents some data on countries of fewer than 1 million residents. Although tiny consumer markets, the residents of many of these countries have relatively good health and high standards of living, compared with larger countries in their regions. The life expectancy at birth in Iceland, Cyprus, Luxembourg, Malta, Barbados, and Qatar, for example, is similar to that of the United States. While the United States has had an average annual inflation rate around 7.3 percent, countries such as Luxembourg, Malta, and Guinea-Bissau have had lower rates. And three of these comparatively small countries have a higher GNP per capita than the U.S.

The table on this page provides some comparative data from the 1985 edition of *The World Development Report*. A summary and ordering information for the 1985 edition of *The World Development Report* appears in the Publications section of this issue. •

INDICATORS FOR UNITED NATIONS AND WORLD BANK MEMBER COUNTRIES WITH POPULATIONS OF LESS THAN 1 MILLION*

UN/World Bank member	population (thousands) mid-1983	GNP per capita (dollars) 1983	GNP per capita (dollars) 1982	average annual growth rate (percent) 1965-83	average annual rate of inflation (percent) 1965-73	average annual rate of inflation (percent) 1973-83	life expectancy at birth (years) 1983
Guinea-Bissau	863	180	170	—	—	6.9	38
Gambia, The	697	290	360	1.4	3.0	10.4	36
Sao Tome and Principe	13	310	370	−1.3**	—	8.8	65
Cape Verde	315	320	350	—	—	11.9	64
Guyana	802	520	670	0.5	4.3	7.7***	69
Solomon Islands	254	640	660	—	4.8	10.4	57
Grenada	92	840	760	0.9	—	—	69
St. Vincent and the Grenadines	102	860	620	1.8	6.1	11.6	69
Swaziland	705	870	940	2.6	4.3	14.1	55
Botswana	998	920	900	8.5	4.4	9.8	61
St. Christopher and Nevis	46	950	750	2.4	6.4	10.0	63
Dominica	81	980	710	−0.4	6.1	15.1	—
St. Lucia	125	1,060	720	3.1	5.5	10.5***	69
Belize	153	1,140	1,080	3.6	—	8.1	66
Mauritius	993	1,160	1,240	2.8	5.6	13.1	67
Antigua and Barbuda	78	1,710	1,740	−0.4	6.6	9.1	—
Fiji	670	1,790	1,950	3.4	5.6	9.2	68
Seychelles	65	2,400	—	3.4	—	—	—
Suriname	374	3,420	—	4.5	—	10.1	65
Malta	360	3,490	3,800	8.7	2.4	5.8	73
Cyprus	655	3,68	3,840	5.5	1.6	10.8	75
Gabon	695	3,950	4,000	3.2	5.8	18.5	50
Barbados	253	4,050	2,900	3.8	6.5	12.9	72
Bahamas	222	4,060	3,830	−1.8	—	—	69
Iceland	237	10,260	12,150	2.6	15.1	45.2	77
Bahrain	391	10,510	9,280	—	—	—	69
Luxembourg	365	14,650	14,340	3.9	5.0	6.6	73
Brunei	209	21,140	—	—	—	—	—
Qatar	281	21,210	21,880	−7.0**	—	—	—
United States	233,500	14,110	13,160	2.2	2.9	7.3	75

* *Although Comoros, Djibouti, Equatorial Guinea, Maldives, Vanuatu, and Western Somoa are also members, they were not included in this table because most indicators are not available. The United States is included as a benchmark.*

** *Because data for the entire period are not always available, figures are for periods other than specified.*

*** *Figure is for 1973-82, not 1973-83.*

Source: The World Bank Development Reports, *1984 and 1985*.

REGIONS

EUROPE

FRANCE

The French Embassy Press and Information Service is out with a new quarterly, complimentary magazine designed to provide U.S. residents with some insight into French culture. For a copy, write to the French Embassy Press Service, 4101 Reservoir Road, N.W., Washington, DC 20007.

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The January 1, 1985 French population of 55,061,000 represents double the population of 1779. It took 205 years to double, at a rate of approximately one-third of a percent a year.

This growth took place unevenly. France only had 40 million people from 1924 (the return of Alsace-Lorraine) until after World War II. It hit 45 million people in 1945, then 50 million in 1968 (in-migration of Algerians). It took 16 years to get to 55 million, but according to French demographer Michel Louis Levy, it is doubtful it will ever reach 60 million because of a low fertility rate and weak immigration. Levy expects the population to peak in another 15 years and then decrease slightly.

In usual Gallic fashion, Levy believes 55 million is a nice round number because the physical area of France is 550,000 square kilometers, so France is now among the countries with 100 people per kilometer. Also, France's death rate is 10 per 1000 or 550,000 deaths per year.

In a March release of *Population et Societes* from the l'Institut National d'Etudes Demographiques, Levy notes that the marriage rate in France broke a record in 1984 — at 5.2 people per 1,000, it was a peacetime low. Subtracting remarriages and considering only people in the usual marrying ages, this figure is even lower. This means that at the present rate, a whopping 45 percent of men and 42 percent of women in their 50s will be single, compared with the present rates of 10 percent of men and 7 percent of women. Illegitimate births are on the rise. The fertility rate is up slightly, from 1.79 children in the lifetime of the average woman in 1983 to 1.81 in 1984. Fertility is up for women aged 25 to 34 and down for younger and older women.

With relatively few births and deaths, the French population is bound to age. At 29 percent of the total population, the proportion aged 0 to 19 is the lowest ever. Given the low birth rates from 1914 to 1918, France's population pyramid bows in near the top, but there is a slight bulge at the top for people over the age of 85 who are now 1.2 percent of the population.

—Translated and summarized from the French by Martha Farnsworth Riche.

WEST GERMANY

Despite the aging of the population in West Germany, deaths in 1984 decreased by about 3 percent over the previous year. The biggest killer in 1984 was circulatory system disease which claimed 352,000 of the nearly 700,000 lives taken that year. Cancer came in second, causing about 158,700 deaths or 22.8 percent of the total, proportionally higher than 1983's 22.4 percent, but representing a decline in actual numbers of 2,300. Of the cancer deaths, one-sixth were from cancer of the lungs or other respiratory passages. Injuries from poisonings accounted from 38,000 more than 5 percent of the total. The statistics are from the Federal Bureau of Statistics, via the German Information Center in New York.

ITALY

The Italian woman is adjusting to changing times. She is the manager of the household, very busy, has a husband who helps with the chores, is increasingly better educated, has fewer children, and is relatively well placed on the labor market, but she still favors part-time work.

These results are from a survey conducted by the Italian Vocational Training Research Institute (ISFOL). The survey, which was carried out over a period of three years, covered every region in Italy and included 5,088 families and 7,330 women. In each case, two typical days — a working day and a nonworking day — were analyzed. The study provides the following picture:

The number of children in each family continues to decrease (to 1.6), but on the other hand, the number of people described in the survey as "relatives living in the household,' is growing. Many of the younger women and even some of those over age 25 say they are not especially interested in children and marriage. Even when they are working and independent financially, they prefer to remain with their parents because of "emotional ties," but also because it is "convenient and comfortable."

Over half the women with a man in the household devote more than five hours a day to housework. Even the 20 percent who say their partner helps with the work, continue to bear the main burden of domestic duties. This includes not only routine housework but also certain kinds of "services," such as cleaning, repairing household items, or taking children back and forth to school.

Fewer and fewer Italian women take a long maternity leave from work be-

cause it would make their reintegration into the labor force difficult. Part-time work is preferred by 80.5 percent of the women because they want more time with the family, leisure for their own interests, and time to improve their education.

—Adapted from the Cedefop News, Center for the Development of Vocational Training, Berlin.

ASIA

BURMA

Burma recently released the results of a national census conducted in the spring of 1983. It has a population of 37 million, with an average population density of 52 persons per square mile. However, two-thirds of the population live in the central plateau and southern delta regions along the Irrawaddy River. The 25 million people who make up the ethnic majority, the Burmese, comprise about 68 percent of the population.

—Population Headliners, June 1985.

INDONESIA

Since the beginning of this century, the government of Indonesia has carried out transmigration projects to encourage the underused labor force in Java to take advantage of the underused land of the Other Islands.

The objectives of Indonesia's transmigration program are to improve employment opportunities and incomes for poor and landless laborers from Java, Madura, Bali, and Lombok and to relieve population pressures on these islands, especially in environmentally vulnerable areas. Further, the program aims at promoting balanced regional development and at increasing the production of food and tree crops.

The transmigration program is voluntary and applicants are placed on waiting lists. The current list includes more than 445,000 heads of households, which exceeds the current capacity of settlement sites.

Most settlers are young, recently married, and have some farming experience. The majority come from the overpopulated upland rural areas of Java. They are provided with transport to their new homes, two or three hectares of land, a house, and food for up to 18 months. The settlers also receive seeds, fertilizers, pesticides, and implements for about three years. The settlements supply social services such as water, health dispensaries, and schools.

In Java, it is estimated that the transmigration program reduces the annual rate of population growth by about one-third. The program for 1984 to 1989 aims at decreasing the population growth rate in the island from 1.7 percent to 1.1 percent a year.

The impact on the labor force is even more significant. During 1979 to 1984, transmigration resulted in the creation of about 700,000 jobs. For 1984 to 1989, the program is expected to create an average of 200,000 jobs a year, equivalent to about 30 percent of the annual increase in the labor force in Java.

Transmigration has also had an effect on the country's social welfare, providing improved education and health services to transmigrant families. Further, it has helped regional development and provided an economic justification for building roads and bridges in sparsely populated areas. Another positive effect is that soil exhaustion and erosion have arrested in the most densely populated areas of Java. Much of the transmigration effort has been funded through the World Bank.

AFRICA

MAURITIUS

The most recent statistical summary from Mauritius, a small island off the eastern coast of Madagascar, shows a total population of 969,100 people. About 42 percent of the population lives in urban areas. Nearly a third of the population is under age 15, and nearly 40 percent is under age 18. Only 7 percent of the population is aged 60 and over.

MAURITIUS EMPLOYMENT IN LARGE ESTABLISHMENTS BY INDUSTRY: 1983

Community, social, personal services	63,129
Agriculture and fishing	55,888
Manufacturing	38,054
Wholesale, retail trade, restaurants, hotels	8,806
Transport, storage, communications	7,724
Finance, insurance, real estate, business services	4,615
Construction	4,436
Utilities	4,133
Mining and quarrying	165
Not otherwise specified	6,224
Total employment	193,174

In 1983, Mauritius had a net increase of 9,400 people. There were 10,000 marriages, and the birth rate was 75.8 per 1,000 women aged 15 to 49.

Tourism is important to Mauritius. In 1983, there were 123,600 visitors to the country, up about 5,000 from the prior year. Twenty-six percent of tourists came from Reunion, 17 percent from France, and 21 percent from South Africa. The rest came primarily from other African nations, Italy, U.K., Germany, India, and Australia. The average tourist spent 11 nights.

In 1982, there were 634 medical practitioners, 71 dentists, and 2,094 nurses and government midwives. There were 11 hospitals with a total of 107,244 hospital admissions recorded in 1982. Other medical facilities included 104 family-planning clinics, 33 supply centers, 89 maternal- and child-health clinics, and 62 public dispensaries.

In 1983, there were 268 primary schools and 127 secondary schools on Mauritius. Total enrollments were 133,255 children in primary school and 75,963 children in high school. The University of Mauritius had 321 students, most in the school of administration.

The table shows the employment structure in Mauritius. •

continued from page 8

Strong economic growth, low inflation, and financial stability can be attained and international capital can resume its productive role in economic development, according to the report, depending on the policy choices made by governments.

The policy choices of governments — of both developed and developing countries — will largely determine whether the global economy will attain faster and more stable growth and whether creditworthiness will improve for every group of developing countries, the staff study says. These goals can be achieved in the next five years, the report contends, and offers a "realistic" set of assumptions in support of economic scenarios that lead to these goals.

"The financial links between industrial and developing countries have become as integral to the world economy as trade has hitherto been," the report says. "The world has made progress in overcoming the financial difficulties of the early 1980s, but it still has much to do. Debt cannot be seen in isolation, as something that occasionally becomes a 'crisis' needing urgent attention."

This is an important reference work for anyone working on global economic analysis.

Demographic Yearbook, 1983. Statistical Papers, Series R, No. 13, 1985, New York: United Nations, pp. 1083, $90 hardcover; $80 paper. Order from United Nations Sales Office, New York, NY 10017.

This is the 35th edition of a comprehensive collection of international demographic statistics. It includes data on population size, births, deaths, marriage, and divorce for about 220 countries or areas of the world.

The results of the 1980 round of population censuses are featured as the special topic in this edition. Demographic and social characteristics include population by single year of age and sex, national and/or ethnic composition, language and religion. Geographic characteristics by major civil division and educational characteristics include literacy, educational attainment, and school attendance.

Travel Industry World Yearbook: The Big Picture — 1985, by Somerset R. Waters, 1985, New York: Child and Waters, Inc., 136 pp., $49 plus $3 mailing charge. Order from Child and Waters, Inc., 516 Fifth Ave., New York, NY 10036; telephone (212) 840-1935.

In 1985, more than 6 million Americans are expected to travel to Europe. And Americans aren't the only ones traveling to foreign shores. In 1984, more than 2 million Japanese visited the United States. These are two of hundreds of interesting statistics gleaned from the 1985 edition of the *Travel Industry World Yearbook*.

From reviewing this yearbook, which offers a country-by-country description of travel trends, the reader can learn that in the last few years Turkey has had one of the fastest-growing rates of nights spent. In 1983, foreign tourists spent 2.6 million nights in hotels in Turkey, compared with 3.0 million nights in Sweden or 19 million nights in Germany. The reader could also learn that since a sharp decline between 1979 and 1980, there has been a steady increase in travel between the United States and the Soviet Union. In 1979, 57 million people traveled from the U.S. to Russia; in 1980, only 18 million people made the trip; and by 1983, the number had risen to 50 million.

Besides detailing statistics that show how the travel industry is changing, the author also comments on how travel effects the economy. World travel is a $4-billion-a-day business, he says, and on a worldwide basis, tourism generates 59.8 million jobs. In 1983, according to the *Yearbook*, there were 13 million tourism-related jobs generated in the United States, 13.4 million such jobs in Europe, 6.7 million jobs in Canada and the Pacific, and 26.7 million in the rest of the world.

In 1982, the 10 countries that launched the most tourists (as measured in their expenditures worldwide) were West Germany, the United States, the United Kingdom, France, Mexico, Japan, Canada, Netherlands, Venezuela, and Switzerland. The countries that benefited most from tourists were the U.S., Italy, Spain, France, U.K., West Germany, Mexico, Austria, Switzerland, and Canada. •

COMING UP

Buenos Aires — the Paris of South America — is the most European of all Latin American capitals. The October issue explores the consumer markets in its neighborhoods.

Consumer markets can be created in the Third World — how one organization makes it work.

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